

First-Time Users Guide

This guide is designed to show the first-time user how to complete an NRR-DR application using the NRR-DR 2009 Software. Before attempting to fill out the project application, the user should read the following sections of the 2009 NRR-DR Procedures Manual:

- Section 1, NRR Program Overview and Policies
- Section 2, DR Program Overview and Policies
- Section 3, Estimating Energy Savings and Incentives
- Section 5, Software Instructions

The 2009 NRR-DR Procedures Manual is available on the NRR-DR 2009 CD-ROM and can be printed out.

General Information: The NRR-DR 2009 Software uses a database to store the information on your projects. It is recommended that you install the program on a single machine and use that machine to process your applications. It is possible to move the data file, but it is not recommended to move from machine to machine on a routine basis. The mechanics of using the program are explained on the following screen.

The screenshot shows the 'Application Scope' window of the NRR-DR 2009 software. The window title is 'SPC2009 - Project Year 2009'. The main area contains a form with the following fields and controls:

- Project Name:** Sample Project (with an 'Edit Project Name' button)
- Utility:** Pacific Gas and Electric Company
- Anticipated Installation Date:** 12/29/2008 (with an 'Enter / Edit Install Date' button)
- Project Sponsor:** Sponsor (with an 'Edit Sponsor' button)
- Customer Company Name:** (with an 'Edit Customers' button)
- Customer Type:** Commercial (dropdown menu)
- Payee:** Customer (dropdown menu)
- Total number of customer sites project includes:** 1 (with an 'Edit Customer Sites' button)
- Total number of measures project includes:** (with a 'Create / Edit Measure' button)
- Include Financial Analysis?:** (with a '10.1388%' dropdown)
- Discount Rate:** Use Discount Default Rate (6.25%)

At the bottom of the window, there are several navigation buttons: Help, Home, Finish, Save, << Back, and Next >>. The 'Generate Submittal' button is also visible at the bottom right.

Callout boxes provide the following explanations:

- Identifies current submittal level:** Points to the 'Application' label at the top left.
- Identifies current database file name and year:** Points to the window title 'SPC2009 - Project Year 2009'.
- Sheet Title: Identifies where you are in program:** Points to the 'Application Scope' header.
- Screen Controls: "-" minimizes screen, "X" closes program:** Points to the window control buttons.
- Project Sponsor and Project Name:** Points to the 'Project Sponsor' and 'Project Name' fields.
- Menu Input Field: Click on arrow to select menu option for input field:** Points to the dropdown arrow for 'Customer Type'.
- Text Input Field: Type your entries into the white input fields:** Points to the 'Discount Rate' input field.
- Help Button refers you to the NRR-DR Procedures Manual, and Main Page returns you to the opening screen of the software program:** Points to the 'Help' button.
- Finish Button completes data entry for the current procedure. Enter Finish after data entry is completed:** Points to the 'Finish' button.
- Save Button saves inputs. Should be used when inputs are completed:** Points to the 'Save' button.
- Back Button returns to previous screen. Inputs may be lost, so save before clicking Back if you want to keep inputs:** Points to the '<< Back' button.
- Next Button advances to next screen. Enter Next after data entry is completed:** Points to the 'Next >>' button.

Main Page: After opening the software program, you will begin at the Main Page. Click on whichever of the four functions you wish to use.

Screen 1

The screenshot shows the main interface of the SPC2009 software. The title bar reads "SPC2009 - Default" with menu options "File", "Utility", and "About". The main area has a teal background with the text "Non Residential Retrofit - Demand Response" and "2009". Below this is the Pacific Gas and Electric Company logo and the text "Administered By: Pacific Gas and Electric Company". A disclaimer at the bottom states: "The estimating tools within the Energy Savings Calculator are subject to change. Please note that any calculations submitted using the software will be reviewed by Pacific Gas and Electric Company using the most current software version available at the time of review." Four yellow buttons are at the bottom: "First-Time Users", "Create or Edit SPC Applications", "Program Procedures Manual", and "Energy Savings Calculator".

Callout boxes provide the following information:

- First-Time Users:** Access the "First-Time Users Guide," which provides helpful tips for new users.
- Create or Edit SPC Applications:** Create new project applications or edit existing applications. This is the starting point for filling out applications.
- Program Procedures Manual:** Procedures Manual, Appendices, and Forms in PDF format are available for review and printing.
- Energy Savings Calculator:** Energy Savings Calculator provides quick access to software tools for estimating energy savings.

Clicking the Create or Edit Applications button takes you to (Screen 2), where you are asked to select whether you want to create a new project application or edit an existing one. After choosing to create a new project, you will be shown several screens used to establish the new project. These include project name (Screen 3), and select existing, or enter project sponsor name (Screen 4).

Screen 2

SPC2009
Enter Selection.

Create a New Project Application
 Edit an Existing Project Application

Buttons: Help, Cancel, OK

Screen 3

SPC2009
Enter a name for the project

Text input field

Buttons: Help, Cancel, OK

Screen 4

SPC2009
Select the existing project sponsor from the drop down list or type in a new project sponsor name.

Dropdown menu

Buttons: Help, Cancel, OK

Select Submittal Level: Once this basic information about the project is established, you will be sent to Select Submittal Level (Screen 5). With a new application, you can only select “Project Application.” After the Project Application has been submitted, you will be able to access “Installation Report.” On this screen, you also select your preferred data entry method; see Section 5.4.2.3 of the *NRR-DR Procedures Manual* for details.

Screen 5

Submittal Level
Allows you to select the current submittal level.

Step-by-Step
allows you to select the area that you wish to edit, and then the software steps you through the screen(s) using dialog boxes to enter the data. Select the area you wish to edit from Application Scope (Screen 6).

Complete Application
steps you through the entire application with dialog boxes. You simply provide the requested inputs and the program does the rest.

Screen Edit
allows you to edit any field on a given screen. Select the area you wish to edit from Application Scope (Screen 6).

Application Scope: Application Scope (Screen 6) is where you define the scope of the project—number of Customers, sites, and measures—and access other screens for more details.

Screen 6

Select the type of customer this application is for.

Enter the total number of sites for all customers combined.

Enter the total number of measures for all sites combined. If the same measure is proposed for two sites, it should be entered as two separate measures, one for each site.

Select the check box and electric rate to include the Financial Analysis calculation, select the lower check box to use the default rate or enter a different rate in the textbox.

Use this button to save, preview, email, or generate a submittal. It checks inputs for completeness prior to generating submittals. This button allows the user to email a copy to the Utility for pre-processing. **A signed hard copy and two copies must still be delivered to the Utility Administrator for application acceptance.**

Use these buttons to edit the project name, and anticipated installation date.

Use these buttons to go to input screens for Project Sponsor, Customer, Payee, sites, and measures. Details of these screens are described on the following pages.

Use this button to import pre-existing measures into this application.

Project Sponsor Summary Information: Enter data on the Project Sponsor. A Corporate Parent is a company that owns the Project Sponsor. If this does not apply, enter N/A. Clicking on the Edit Sponsor button on the Application Scope screen accesses this screen. Clicking “OK” returns you to that screen.

Screen 7

SPC2009 - Project Year 2009

Application: Project Sponsor Summary Information

Sample Project Sponsor Name: Sample two

Project Name: Sample two

Sponsor's Company Name: Sample Project Sponsor Name

Sponsor's Federal Tax ID #: 1212121212

Sponsor's Tax Status: Corporation Exempt Reason

Sponsor's Contact Name: Spencer Conrad

Street Address: 8555 Aero Drive
Enter the project sponsor's street a

Suites 205-6

City: San Diego State: CA Zip Code: 92123

Phone: (800) 555-1212 FAX: () - -

E-mail: sconrad@mail.com

Sponsor's Corporate Parent Name: n/a

Sponsor's Corporate Parent Fed Tax ID#: n/a

Buttons: Help, Home, Finish, Save, << Back, Next >>

Customer Summary Information: Enter information on the Customer. A Corporate Parent is a company that owns the Customer. If this does not apply, enter N/A. This screen is reached by clicking the Edit Customers button on the Application Scope screen. Clicking “OK” returns you to that screen.

Screen 8

SPC2009 - Project Year 2009

Application: Customer Summary Information

Sample Project Sponsor Name: Sample two

Customer 1 of 1

Customer Company Name: ABC Manufacturing

Customer Fed Tax ID #: 111-3333333

Customer's Tax Status: Corporation Exempt Reason

Customer Contact Name: James Johnson

Street Address: 111 Second Street
 Suite 333

City: San Francisco State: CA Zip Code: 92222

Phone: (800) 555-1212 FAX: () - -

E-Mail: jjohnson@mail.com

Customer Corporate Parent Name: n/a

Customer Corporate Parent Fed Tax ID #: n/a

Buttons: Help, Home, Finish, Save, << Back, Next >>

Site Summary Information: Enter general information on the Customer's site. This screen is reached by clicking on the Edit Customer Sites button on the Application Scope screen. Clicking "OK" returns you to that screen.

Screen 9

The screenshot shows the 'Site Summary Information' form. At the top, it says 'Application: Site Summary Information' and 'Sample Project Sponsor Name: Sample two'. Below this, there's a dropdown for 'Select the customer site you wish to edit' with '1 - Unnamed' selected. Other fields include 'Site Customer Name' (1 - ABC Manufacturing), 'Site Name' (ABC Plant 1), 'Site Address' (111 Second Street), 'City' (San Francisco), 'State' (CA), 'Zip Code' (92222), 'Site Contact Name' (Fred M), 'Site Phone' ((800) 555-1212), 'Facility Description/Type' (Manufacturing plant), 'Property Type' (Fabrication/Heavy Industry), 'Building Area (sq ft of Total Facility)' (300000), 'Building Age (in years)' (10), and 'Number of Floors' (2). At the bottom right, there is an 'Edit Meter Data' button. Navigation buttons like 'Help', 'Home', 'Finish', 'Save', '<< Back', and 'Next >>' are at the very bottom.

The top menu will list "1 - Unnamed" for the site until a site name has been entered on the following line. Note that the Customer name appears in its menu box. For multiple-Customer applications, be sure to select the correct Customer for the site.

After entering the basic site data, click on the Edit Meter Data button to enter data on the site's energy usage.

Site Meter Summary: Enter data on the site's energy usage. This information is normally available from the site's utility bills. This screen is reached by clicking "Edit Meter Data" on the Site Summary Information screen. Clicking "Finish" returns you to that screen.

Screen 10

The screenshot shows the 'Site Meter Summary' form. At the top, it says 'Application: Site Meter Summary' and 'Sample Project Sponsor Name: Sample two'. Below this is the title 'Site Energy Use'. There are two tables. The first table has columns: 'Energy Supplier', 'Electric Usage (kwh/year)', 'Electric Peak (kW)', and 'Gas Usage (Therms/year)'. The first row shows 'PG&E', '35000000000', '12000', and '0'. The second table has columns: 'Meter ID #', 'Energy Distribution Company', 'Interval Meter', 'Rate Schedule', 'Energy Supplier Meter Number', and 'Service Agreement ID'. The first row shows '1', 'PG&E', 'Yes', 'TOU-8', '12345-6', and '123456-111'. Navigation buttons like 'Help', 'Home', 'Finish', 'Save', '<< Back', and 'Next >>' are at the bottom.

Energy Supplier is the company that provides the power used by the site. This may be the same as the Utility Administrator or may be a third-party provider.

Energy Distribution Company is the company that delivers the power used by the site. This is the Utility Administrator.

Measure Summary Information: Enter general information on the energy efficiency measure. This screen is reached by clicking on the Edit Measures button on the Application Scope screen. Clicking “OK” returns you to that screen.

Screen 11

The screenshot shows a software window titled "SPC2009 - Project Year 2009" with a sub-header "Measure Summary Information" and "Measure 1 of 1". The form contains the following fields and callouts:

- Select the measure you wish to edit:** A pull-down menu showing "1 - Unnamed". Callout: "Use this menu to select individual measures for data input. The menu will display the number of measures that were entered on the Application Scope screen. Until each measure is named (entered on line below), it is listed as: 1 - Unnamed, 2 - Unnamed, etc."
- Measure Name:** Text field containing "Chiller Retrofit".
- Customer Site for this Measure:** Text field containing "1 - ABC Plant 1". Callout: "Use menu input fields to select the site and meter that this measure is associated with."
- Meter ID:** Text field containing "1 - 12345-6".
- Category:** Text field containing "(@ \$0.15 kWh/yr) AC&R I". Callout: "Select the measure type using the pull-down menu. If the measure is not specifically listed, use Lighting, AC&R, or Other, depending on the nature of the measure. See 2009 NRR-DR Procedures Manual for details."
- Calculation Method:** Text field containing "Estimation Software (NRR-DR)". Callout: "Use this pull-down menu to select your calculation method. The estimation software method is the simplest to use, but it is limited to select measures. Engineering calculations can be used for any measure, but require backup documentation. The software based on user-entered information predetermines the Itemized Approach and the Early Retirement procedure. This information can be modified by selecting the modify approach button."
- Retrofit or New Install:** Text field containing "Retrofit (Same Load / Production)".
- Measure Type:** Text field containing "High-Efficiency Packaged A/C or Chillers".
- Cost of Measure (Parts & Labor):** Text field containing "\$2,000,000.00". Callout: "Use this menu to select type retrofit or new install."
- Life of Measure in Years:** Text field containing "20".
- Future Salvage Value (proposed equip.):** Text field containing "\$100,000.00". Callout: "Enter the total cost of the measure. These costs include design, engineering, construction, materials, and fees, as well as the costs associated with participating in this program such as costs for completing the forms and conducting M&V."
- Salvage Value (existing):** Text field containing "\$150,000.00". Callout: "Enter Future and existing salvage values, used with Financial Analysis"
- Enter a brief description of this measure:** Text area containing "Salvage values are used with the Financial Analysis to calculate Net Present Value." Callout: "Enter a description describing the fundamental aspects of the measure."
- Buttons:** "Enter Measure Details", "Help", "Home", "Finish", "Save", "<< Back", "Next >>". Callout: "After completing the inputs on this screen, click this button to advance to the Measure Details screen. Based on the inputs, the software selects the appropriate screen for your measure."

After completing all of the measures, use the Generate Submittal button on the Application Scope screen to have the software check the inputs and prepare the submittal. Here you may elect to “Save to File:”, “Email:”, “Preview”, or “Submit to Utility” via email. If you need to stop while preparing the application, just save your inputs by clicking on the Save button and return to the Main Page, then click on the Exit button. Your work will be saved in the database and can be accessed by starting the software and selecting the Edit Existing Project option after clicking on the Edit/Create Application button.